

How to Guide for Accessing Coordinated Entry Reports

November 2022

VI-SPDAT

1. Log in to HMIS using the “2020 Coordinated Entry” workgroup and your “Coordinated Entry Region #” as the organization.
2. From the “Home” dashboard, click the “Clients” icon on the left-hand side of the screen.
3. Click on “Assessments” to expand the menu.

The screenshot shows the ClientTrack interface. On the left sidebar, the 'Assessments' icon is highlighted with a red box and a red arrow. The 'Assessments' menu is expanded, and the 'VI-SPDAT' option is highlighted with a red box and a red arrow. The main content area displays the 'VI-SPDAT/F-VI-SPDAT History' for a client named Luke Skywalker (ClientID 1048334). The history shows one result found, which is a 'Single Adults' assessment dated 11/10/2022 at 10:21AM. The scores are: General (0), Family (2), History (2), Risks (1), Socialization (2), Wellness (1), and Total (6).

Type	Vulnerability Index Assessment Date	Score General	Score Family	Score History	Score Risks	Score Socialization	Score Wellness	Score Total
Single Adults	11/10/2022 10:21AM	0	2	2	1	2	1	6

4. After the menu expands click on “SPDAT & VISPDAT” and then “VI-SPDAT”. **PLEASE NOTE: The “SPDAT and F-SPDAT” options are not functional since the IN BoS CoC does not utilize the full SPDAT tools.**
5. During this tutorial, we will choose the “VISPDAT”.

The screenshot shows the ClientTrack interface. On the left sidebar, the 'SPDAT & VISPDAT' menu is expanded, and the 'VI-SPDAT' option is highlighted. The main content area displays the 'VI-SPDAT/F-VI-SPDAT History' for a client named Luke Skywalker (ClientID 1048334). The history shows one result found, which is a 'Single Adults' assessment dated 11/10/2022 at 10:21AM. The scores are: General (0), Family (2), History (2), Risks (1), Socialization (2), Wellness (1), and Total (6).

Type	Vulnerability Index Assessment Date	Score General	Score Family	Score History	Score Risks	Score Socialization	Score Wellness	Score Total
Single Adults	11/10/2022 10:21AM	0	2	2	1	2	1	6

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- A report will display with Household Type, Assessment Date, Total Score, and Category Scores.
- To view the VI-SPDAT assessment, click the three dots to the left of the record and then select **"Edit/View Single Adult"** in the pop-up menu (this will take you to the actual completed VI-SPDAT for the Client).

Search

Assessments

- Barriers
- COVID-19 Screening
- COVID-19 Vaccines
- Diversion Assessments
- Domestic Violence
- Education - Adult
- Education - Child
- Employment
- Financial
- Housing Assessment Disposition
- SPDAT & VISPDAT
 - VI-SPDAT**
 - TAY-VI-SPDAT
 - ViSpatProgress Report
- Triage Assessment
- Universal Data
- Veteran Assessments
- Vulnerability Index Assessments

Client: Luke Skywalker, 1/1/2000, XXX-XX-0000, ClientID: 1048334

VI-SPDAT/F-VI-SPDAT History

All Vulnerability Index Service Prioritization Decision Assistance Tool (VI-SPDAT/Family(F)-VI-SPDAT) Assessments for the selected client are displayed below.

OrgCode Consulting Inc. and Community Solutions are the authors of the VI-SPDAT and F-VI-SPDAT. ClientTrack Inc. is licensed to include these tools within ClientTrack. The terms of this license require that users must be trained on the use and implementation of the tool by OrgCode Consulting, Inc. or an approved and certified trainer of Licensor. It is not permissible to alter the wording or scoring of the VI-SPDAT or F-VI-SPDAT forms without permission and written consent from Community Solutions and/or Org Consulting, Inc.

+ Add New VI-SPDAT Assessment + Add New Family-VI-SPDAT Assessment

1 result found.

Type	Vulnerability Index Assessment Date	Score General	Score Family	Score History	Score Risks	Score Socialization	Score Wellness	Score Total
Single Adult	11/10/2022 10:21AM	0		2	1	2	1	6

Edit / View Single Adult

Delete Assessment

Cancel

Search

Assessments

- Barriers
- COVID-19 Screening
- COVID-19 Vaccines
- Diversion Assessments
- Domestic Violence
- Education - Adult
- Education - Child
- Employment
- Financial
- Housing Assessment Disposition
- SPDAT & VISPDAT
 - VI-SPDAT**
 - TAY-VI-SPDAT
 - ViSpatProgress Report
- Triage Assessment
- Universal Data
- Veteran Assessments
- Vulnerability Index Assessments

Client: Luke Skywalker, 1/1/2000, XXX-XX-0000, ClientID: 1048334

Vulnerability Index (VI) and Service Prioritization Decision Assistance Tool (SPDAT)

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Administration

Assessment:

Date	Type	User
11/10/2022	Other	David Boltz

ClientID: 1048334

Interviewer Name: David Boltz Agency: ☐ Team ☐ Staff ☐ Volunteer

Date/Time: 11/10/2022 10:21 AM

Assessment Level: Housing Needs Assessment

Enrollment: 11/07/2022 - My Fake Organization CoC RRH (RRH-R8) Interview Location:

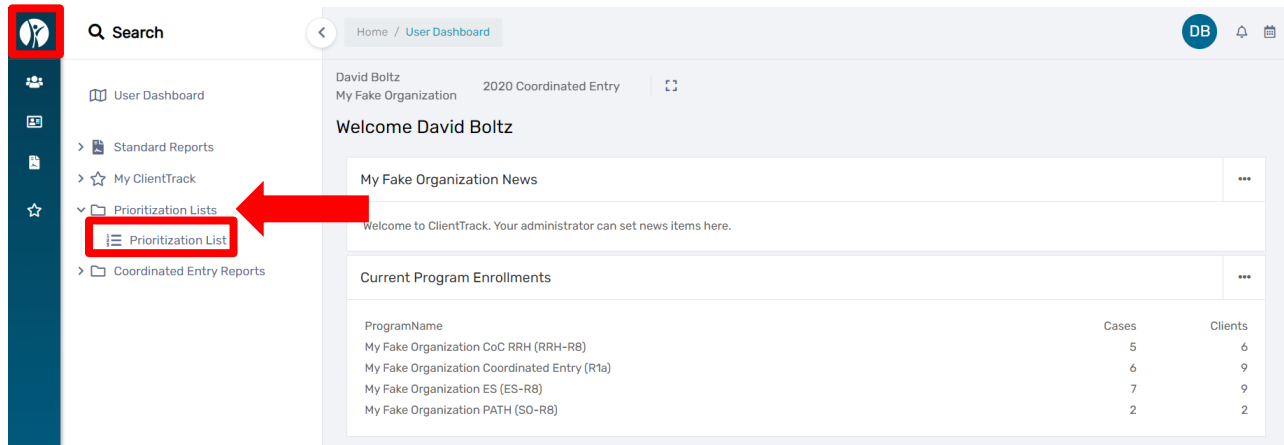
Save Cancel

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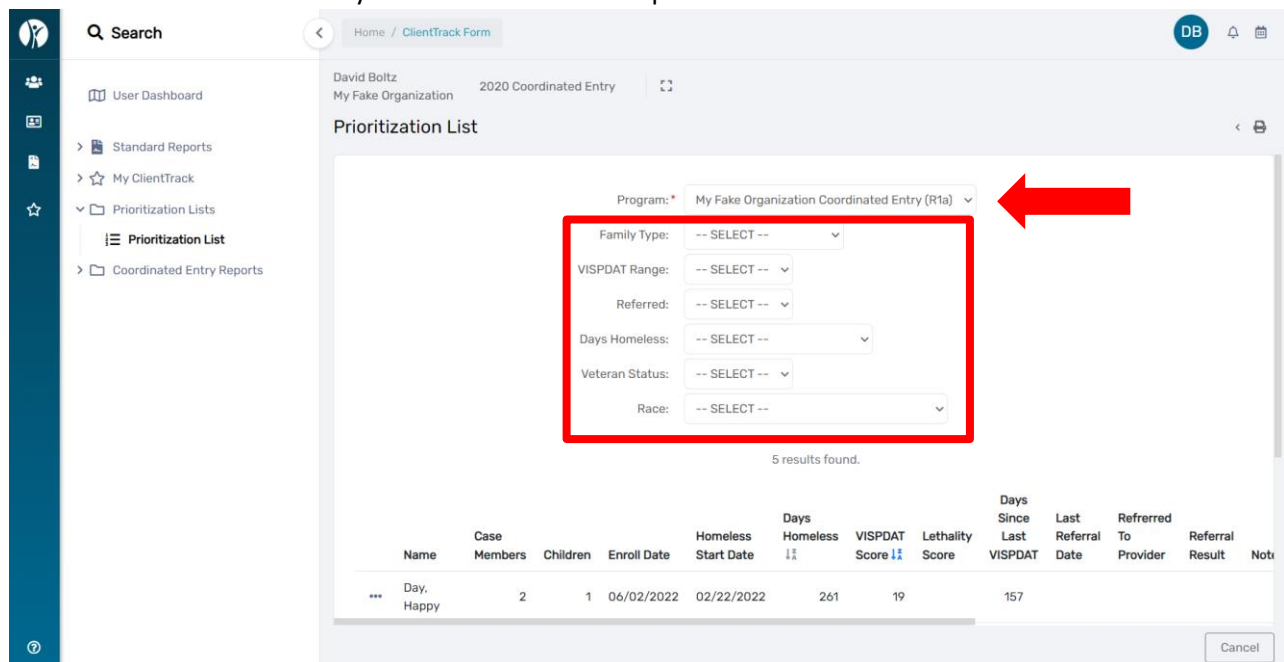
November 2022



Prioritization List

1. From the “Home” workspace, locate the “Prioritization List” function in the menu on the left-hand side of the screen.
2. Click on “Prioritization Lists”. The menu will expand below, click on “Prioritization List” to open the report.



3. Choose your “Coordinated Entry Region #” from the “Program” drop down menu.
 - a. You can also sort by **Family Type**, **VISPDAT Range**, **Referred**, **Days Homeless** and/or **Veteran Status** by clicking on the corresponding drop-down menu then clicking on the sort choice you want to see in the report.



4. Columns with a  displayed in the heading can be sorted by clicking on the .

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5. In the screenshot below, we will sort the “Days Since Last VISPDAT” column by clicking on the **text**. This will sort in ascending order, click one more time for descending order.

David Boltz
My Fake Organization 2020 Coordinated Entry

Prioritization List

5 results found.

Click to sort in descending order

Name	Case Members	Children	Enroll Date	Homeless Start Date	Days Homeless	VISPDAT Score	Lethality Score	Days Since Last VISPDAT	Last Referral Date	Referred To Provider	Referral Result	Notes
Merkel, Marta	1	0	11/07/2022	10/11/2022	30	13	3	3				
Bear, Gummy	2	1	11/06/2022			17		4				
Turtle, Leonardo	1	0	10/27/2022	01/01/2022	313	0		14				
Day, Happy	2	1	06/02/2022	02/22/2022	261	19		157				
Day, New	1	0	02/21/2022	02/15/2022	268	15	3	262				

6. In descending order, the list will sort and display the highest number of “Days Since Last VISPDAT” starting at the top. This sorting tool is helpful when monitoring your Prioritization List for Clients which require a new VI-SPDAT. [\(All Coordinated Entry Clients are required to complete a new VI-SPDAT every 90 days to ensure we have their current information.\)](#)
7. Export the “Prioritization List” by clicking on the “Excel Data Export” icon located at the top right corner of the page. The icons can be identified by hovering your cursor over each choice. A small pop-up window will appear with the identifying information for each icon.

David Boltz
My Fake Organization 2020 Coordinated Entry

Prioritization List

Program: My Fake Organization Coordinated Entry (R1a) v

Family Type: -- SELECT -- v

VISPDAT Range: -- SELECT -- v

Referred: -- SELECT -- v

Days Homeless: -- SELECT -- v

Veteran Status: -- SELECT -- v

Race: -- SELECT -- v

5 results found.

Excel Data Export

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H24																					
A		B		C		D		E		F		G		H		I		J		K	
Custom_VW_Prioritization		Custom_VW_PrioritizationList_ProgramName		Custom_VCT_Priorit		Custom_VCustom_VW_PrioritizationList_Name		Custom_VCustom_VW_PrioritizationList_NoCaseMembers		Custom_VW_PrioritizationList_NoChildren		Custom_VW_PrioritizationList_EnrollDate		Custom							
List_ClientID																					
1	572	My Fake IHDA Coordinated Entry (R1)	1	1	CE, Test	Self		1		0		8/27/2016 12:00 AM									
2	582	My Fake IHDA Coordinated Entry (R1)	2		Family, Adult	Self		2		1		8/28/2016 12:00 AM									
3	574	My Fake IHDA Coordinated Entry (R1)	2		Family L, CE	Self		2		1		9/28/2016 12:00 AM									
4	631	My Fake IHDA Coordinated Entry (R1)	1		test, Test	Self		1		0		5/12/2017 12:00 AM									
5	641	My Fake IHDA Coordinated Entry (R1)	1		Monday, Tired	Self		1		0		2/20/2018 12:00 AM									
6	796	My Fake IHDA Coordinated Entry (R1)	1		Client, ima Lee	Self		1		0		6/6/2017 12:00 AM									
7	794	My Fake IHDA Coordinated Entry (R1)	1		Webster, Bob	Self		1		0		6/6/2017 12:00 AM									
8	792	My Fake IHDA Coordinated Entry (R1)	1		Client, ima	Self		1		0		6/6/2017 12:00 AM									
9	796	My Fake IHDA Coordinated Entry (R1)	1	27	907 Client, ima	Self		1		0		6/6/2017 12:00 AM									
10	803	My Fake IHDA Coordinated Entry (R1)	2		Doe, Jane	Self		1		1		6/7/2017 12:00 AM									
11	805	My Fake IHDA Coordinated Entry (R1)	1		Chan, Jackie	Self		1		0		6/7/2017 12:00 AM									
12	806	My Fake IHDA Coordinated Entry (R1)	1		Perry, Jamie	Self		1		0		6/7/2017 12:00 AM									
13	804	My Fake IHDA Coordinated Entry (R1)	1		908 Jacket, Gene	Self		1		0		6/7/2017 12:00 AM									
14	795	My Fake IHDA Coordinated Entry (R1)	2		Jones, Sue	Self		1		1		6/6/2017 12:00 AM									
15	808	My Fake IHDA Coordinated Entry (R1)	1		Family, Test	Self		1		0		6/13/2017 12:00 AM									
16	810	My Fake IHDA Coordinated Entry (R1)	2		Two, Guest	Self		1		1		6/19/2017 12:00 AM									
17	809	My Fake IHDA Coordinated Entry (R1)	1		Intake, Test	Self		1		0		6/14/2017 12:00 AM									
18	799	My Fake IHDA Coordinated Entry (R1)	1		Doe, Jane	Self		1		0		6/6/2017 12:00 AM									
19	797	My Fake IHDA Coordinated Entry (R1)	1	19	Queen, Oliver F	Self		1		0		6/6/2017 12:00 AM									
20	812	My Fake IHDA Coordinated Entry (R1)	1		New Workflow, Testing	Self		1		0		6/27/2017 12:00 AM									
21	800	My Fake IHDA Coordinated Entry (R1)	1		Jerome, Jesse	Self		1		0		6/6/2017 12:00 AM									
22	819	My Fake IHDA Coordinated Entry (R1)	1	11	Client, CE	Self		1		0		11/7/2016 12:00 AM									
23	835	My Fake IHDA Coordinated Entry (R1)	1		924 Green, Alex	Self		1		0		7/12/2017 12:00 AM									
24	832	My Fake IHDA Coordinated Entry (R1)	1		929 Chan, Jackie	Self		1		0		7/12/2017 12:00 AM									
25	830	My Fake IHDA Coordinated Entry (R1)	1		920 Patch, Cabbage	Self		1		0		7/12/2017 12:00 AM									
26	822	My Fake IHDA Coordinated Entry (R1)	1		client, test1	Self		1		0		2/23/2023 12:00 AM									
27	841	My Fake IHDA Coordinated Entry (R1)	1		927 Betts, Joe	Self		1		0		7/12/2017 12:00 AM									
28	838	My Fake IHDA Coordinated Entry (R1)	1		919 MONROE, JAMES	Self		1		0		7/12/2017 12:00 AM									
29	820	My Fake IHDA Coordinated Entry (R1)	1		925 Obama, Michelle	Self		1		0		7/12/2017 12:00 AM									
30	833	My Fake IHDA Coordinated Entry (R1)	1		921 Ross, Diane	Self		1		0		7/12/2017 12:00 AM									
31	836	My Fake IHDA Coordinated Entry (R1)	1		926 WILLS, JAMES	Self		1		0		7/12/2017 12:00 AM									
32	839	My Fake IHDA Coordinated Entry (R1)	1		Doe, Joe	Self		1		0		7/26/2017 12:00 AM									
33	856	My Fake IHDA Coordinated Entry (R1)	1		Brady, Greg	Self		1		0		7/26/2017 12:00 AM									
34	858	My Fake IHDA Coordinated Entry (R1)	1		Brady, Marsha R	Self		1		0		7/26/2017 12:00 AM									
35	868	My Fake IHDA Coordinated Entry (R1)	1		Irish, noodle	Self		1		0		7/26/2017 12:00 AM									
36	864	My Fake IHDA Coordinated Entry (R1)	1		Pickle, Sweet	Self		1		0		7/26/2017 12:00 AM									
37	863	My Fake IHDA Coordinated Entry (R1)	1		Duck, Bob	Self		1		0		7/26/2017 12:00 AM									
38	860	My Fake IHDA Coordinated Entry (R1)	1		Sue, Curly	Self		1		0		7/26/2017 12:00 AM									
39	867	My Fake IHDA Coordinated Entry (R1)	1		966 Angel, Sweet	Self		1		0		8/1/2017 12:00 AM									
40	863	My Fake IHDA Coordinated Entry (R1)	1		Ramsey, Lois	Self		1		0		7/26/2017 12:00 AM									
41	866	My Fake IHDA Coordinated Entry (R1)	1		4030 Watch, Sara	Self		1		0		8/17/2017 12:00 AM									
42	1334	My Fake IHDA Coordinated Entry (R1)	1		Ducky, Duffy	Self		1		0		8/29/2017 12:00 AM									
Table																					

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CE Length of Stay Report (Detail and Summary)

- From the “Home” workspace, locate the “Coordinated Entry Reports” function in the menu on the left-hand side of the screen.
- Click on “Coordinated Entry Reports”. The menu will expand below, click on “CE Length of Stay Report-Detail” to open the report.
- Type in the “From Date” and “To Date”, select the “Program”, then click “Report” located in the bottom right corner.

David Boltz
My Fake Organization

2020 Coordinated Entry

CE Length of Stay

Saved Report Settings

To use previously saved report settings, select the desired settings description. To save the current report settings, select **Save Settings**, type a description of the settings in the **Save As** field, select the report criteria, and run the report. The saved settings will appear in the list the next time you access this screen.

Saved Report Settings: --SELECT--

From Date: MM/DD/YYYY

To Date: MM/DD/YYYY

Program: Coordinated Entry (R1)
Coordinated Entry (R10)
Coordinated Entry (R11)
Coordinated Entry (R12)
Coordinated Entry (R13)

Report Schedule Report Cancel

- The report will appear as seen below. You can export the report into Excel Data, PDF or Word by clicking on the small disc icon located at the top of the report.

CE Length of Stay

Length of Stay CE Report

Criteria

From Date: 1/1/2018
To Date: 11/10/2022
Program(s): My Fake Organization Coordinated Entry (R1a)

Client ID	Name	Enroll Date	Exit Date	Length of Stay	Destination	Program Name	Household ID	Own ing Org	VI SPDAT	VI SPDATDat e
1048330	Baby, Fur	9/8/2022	10/3/2022	25	No exit interview completed	My Fake Organization Coordinated Entry (R1a)	532064	My Fake Organization	15	9/8/2022
1048319	Bear, Chewy	6/6/2022	9/6/2022	92	Rental by client with RRH or equivalent subsidy	My Fake Organization Coordinated Entry (R1a)	532056	My Fake Organization		
1048319	Bear, Chewy	11/6/2022		4		My Fake Organization Coordinated Entry (R1a)	532056	My Fake Organization		
1048318	Bear, Gummy	6/6/2022	9/6/2022	92	Rental by client with RRH or	My Fake Organization	532056	My Fake	17	11/6/2022

How to Guide for Accessing Coordinated Entry Reports

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“CE Length of Stay Report Summary”

1. From the “Home” workspace, locate the “Coordinated Entry Reports” function in the menu on the left-hand side of the screen.
2. Click on “Coordinated Entry Reports”. The menu will expand below, click on “CE Length of Stay Report Summary” to open the report.
3. Type in the “From Date” and “To Date”, select the “Program”, then click “Report” located in the bottom right corner.

David Boltz
My Fake Organization 2020 Coordinated Entry

CE Length of Stay Summary

Saved Report Settings

To use previously saved report settings, select the desired settings description. To save the current report settings, select **Save Settings**, type a description of the settings in the **Save As** field, select the report criteria, and run the report. The saved settings will appear in the list the next time you access this screen.

Saved Report Settings: -- SELECT --

From Date: * 01/01/2018

To Date: * 11/10/2022

Program: *

- Coordinated Entry (R6)
- Coordinated Entry (R7)
- Coordinated Entry (R8)
- Coordinated Entry (R9)
- ✓ My Fake Organization Coordinated Entry (R1a)

Report **Schedule Report** Cancel

12. The report will appear as seen below. You can export the report into Excel Data, PDF or Word by clicking on the small disc icon located at the top of the report.

Length of Stay CE Summary

Criteria

From Date: 01/01/2018
To Date: 11/10/2022
Program(s): My Fake Organization Coordinated Entry (R1a)

Summary	Count
Active Enrollments	9
New Enrollments	12
Exits	3
Avg Length of Stay (Stayers)	70
Avg Length of Stay (Leavers)	69

Destinations	Count
No exit interview completed	1
Rental by client with RRH or equivalent subsidy	2

Schedule Report Cancel

How to Guide for Accessing Coordinated Entry Reports

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“Open CE Enrollments with Housing Move In”

1. From the “Home” workspace, click on the “Coordinated Entry Reports” tab in the menu on the left-hand side of the screen.
2. The menu will expand below, click on “Open CE Enrollments with Housing Move In” to open the report.
3. Select the “Program”, then click “Report” located in the bottom right corner.

David Boltz
My Fake Organization

2020 Coordinated Entry

Open CE Enrollments with Housing Move In

Returns a list of clients who have an open Coordinated Entry Enrollment and a Move In Date on a subsequent enrollment

Saved Report Settings

To use previously saved report settings, select the desired settings description. To save the current report settings, select **Save Settings**, type a description of the settings in the **Save As** field, select the report criteria, and run the report. The saved settings will appear in the list the next time you access this screen.

Saved Report Settings: -- SELECT --

Program: * My Fake Organization Coordinated Entry (R1a)

Report Schedule Report Cancel

13. The report will appear as seen below. You can export the report into Excel Data, PDF or Word by clicking on the small disc icon located at the top of the report.

Open CE Enrollments with Housing Move In

Criteria

CE Program : My Fake Organization Coordinated Entry (R1a)

Client ID	Name	CE Enrollment Date	Case Manager For CE	CE Exit Date	Project Start Date	Program	Move In Date
1048316	Day, Happy	6/2/2022	Lori Wood		6/6/2022	My Fake Organization CoC RRH (RRH-R8)	6/6/2022

1 of 1

11/10/2022 10:56:24 AM

14. The clients listed on this report have a “Housing Move-In Date” but have **NOT** been exited from “Coordinated Entry”. Please find the Client’s CE HMIS record and exit the Client from their open “Coordinated Entry” enrollment as of their “Housing Move-In Date”.

How to Guide for Accessing Coordinated Entry Reports

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“CE Enrollments and PH Report”

1. From the “Home” workspace, locate the “Coordinated Entry Reports” function in the menu on the left-hand side of the screen.
2. Click on “Coordinated Entry Reports”. The menu will expand below, click on “CE Enrollments and PH Report” to open the report.
3. Enter the “Enroll From Date” and “Enroll To Date”, choose the “Organization” from the list or Organizations displayed, choose the “Program(s)” you wish to view, then click “Report” located in the bottom right corner.

The screenshot displays the 'CE Enrollments and Permanent Housing Report' interface. The left sidebar shows the navigation menu with 'CE Enrollments and PH Report' highlighted. The main area contains fields for 'Enroll From Date' (01/01/2018) and 'Enroll To Date' (11/10/2022), a list of organizations (A Better Way, A Mother's Hope, Advantage Housing Inc, AIDS Ministries Elkhart, AIDS Resource Group Evansville), and a 'Program(s)' section with a checked 'Filter by Program(s)' option. A red box highlights the 'Report' button. Below the main area, a table titled 'CE Enrollments & Permanent Housing Flow' is shown, with a red box highlighting the 'Excel' download option in the top right corner of the table area.

CE Enrollments and Permanent Housing Report

Indicate the time period for this report. Only records that fall within the date range you select will be included.

Enroll From Date: 01/01/2018

Enroll To Date: 11/10/2022

Organization(s)

Indicate which organizations should be included in the report by selecting each organization separately, or click the icon to select all. Note: The list only shows organizations you are authorized to view.

Organization(s): A Better Way, A Mother's Hope, Advantage Housing Inc, AIDS Ministries Elkhart, AIDS Resource Group Evansville

Program(s)

Check the box to limit report results by selected programs. When checked, the list displays programs that belong to the organizations you selected above. Indicate which programs should be included in the report by selecting each program separately, or click the icon to select all.

Program(s): ☒ Filter by Program(s)

Report Schedule Report Cancel

CE Enrollments and Permanent Housing Report

Excel
Excel Data
PDF
Word

Criteria

Date Range : From : 01/01/2018 To : 01/01/2019

Organization :

Program :

Client ID	Name	Case Members	Children	CE Enroll Date	CE Exit	Permanent Housing Program Name	Project Start	Move-In Date	Project Exit	Organization
1 of 1										

11/10/2022 11:03:34 AM

How to Guide for Accessing Coordinated Entry Reports

December 2019

4. The report will display as shown above. This is a helpful tool to track the length of time between enrollment in Coordinated Entry and the Housing Move-In Date. Again, the report can be exported to Excel Data, PDF or Word by clicking on the floppy disc icon.

“Diversion Extract Report”

1. From the **“Home”** workspace, locate the **“Coordinated Entry Reports”** function in the menu on the left-hand side of the screen.
2. Click on **“Coordinated Entry Reports”**. The menu will expand below, click on **“Diversion Extract Report”** to open the report.
3. Choose the **“Organization(s)”** from the list or Organizations displayed, choose the **“Region”** you wish to view, then click **“Report”** located in the bottom right corner.

The screenshot displays the ClientTrack Form interface for generating a 'CE Diversion Extract' report. On the left, a sidebar menu lists various report options, with 'Diversion Extract Report' highlighted. The main content area shows a form titled 'CE Diversion Extract' with a breadcrumb trail 'Home / ClientTrack Form'. The form includes a header with user information (David Boltz, My Fake Organization, 2020 Coordinated Entry). Below this, there are two dropdown menus: 'Organization(s)' and 'Region'. The 'Organization(s)' dropdown is open, showing a list of organizations including 'Muncie Mission', 'My Fake Organization' (which is checked), 'My Sample Organization', 'New Hope Family Shelter', and 'Noble House'. The 'Region' dropdown is set to '1'. At the bottom right of the form, there are three buttons: 'Report' (highlighted with a red box), 'Schedule Report', and 'Cancel'. Red arrows are overlaid on the image to guide the user: one points to the 'Diversion Extract Report' in the sidebar, another points to the 'Organization(s)' dropdown, and a third points to the 'Report' button.

4. The report will display as shown above. This tool is helpful in reviewing the success of Diversion. The report can be exported to Excel Data or PDF.

How to Guide for Accessing Coordinated Entry Reports

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CE Diversion Extract



CE Diversion Extract - Export to Excel for Full Data Set
11/10/2022 11:07 AM



Report Criteria:

Region: 1
Org ID: My Fake Organization

10/27/2022	1	My Fake Organization
10/27/2022	1	My Fake Organization
3/10/2022	1	My Fake Organization

ClientTrack™ Reports

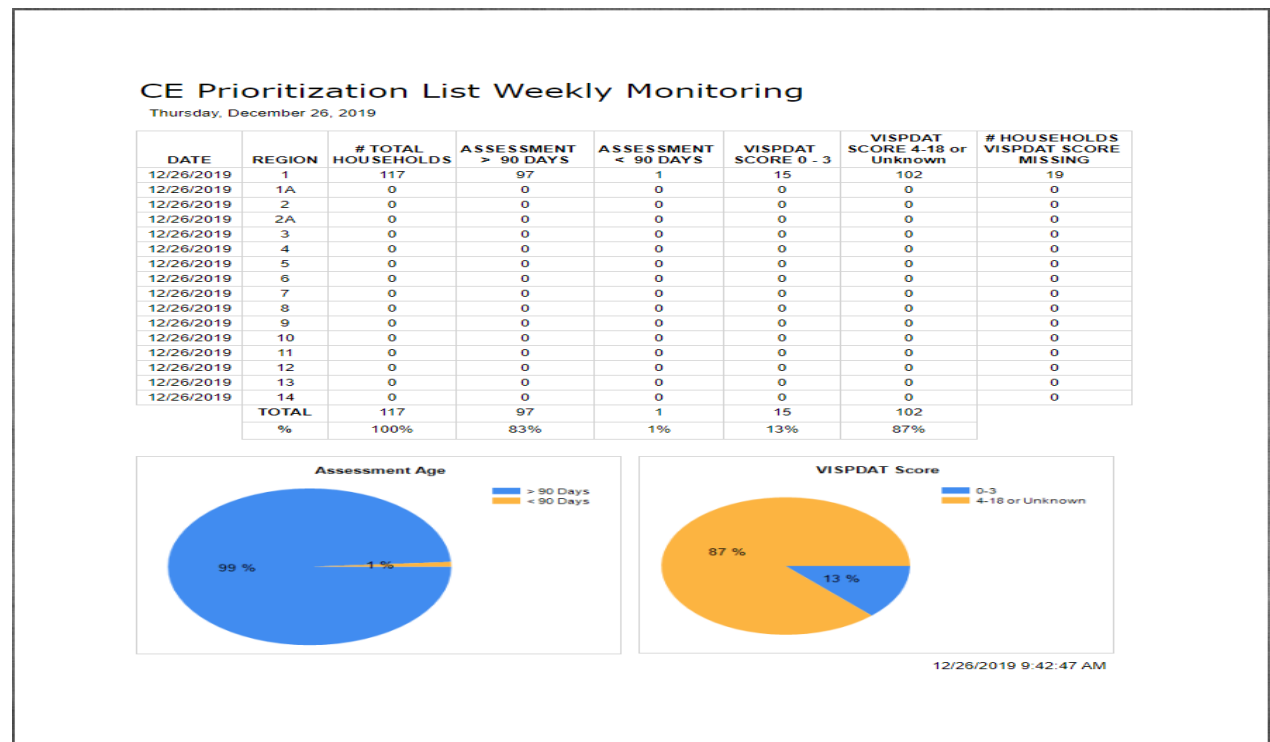
David Boltz
11/10/2022 11:07 AM

5. Once exported to Excel, a zero (0) indicates “No” and a one (1) indicates “Yes”.

6. “Prioritization List Weekly Monitoring Report” - From the “Home” workspace, locate the “Coordinated Entry Reports” function in the menu on the left-hand side of the screen.
7. Click on “Coordinated Entry Reports”. The menu will expand below, click on “Prioritization List Weekly Monitoring Report” to open the report.
8. **All regions are included in this report.** This tool is helpful in monitoring your region’s CE enrollments for Clients with VI-SPDAT assessments older than 90 days.

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December 2019



Please contact the HMISHelpDesk@ihcda.IN.gov if you have questions or need additional information.